



ONLINE BOOKING TOOLS

What Managed Travel Buyers Want, Need And Expect

Twenty years after online booking tools were introduced for managed travel, it's clear that the technology has revolutionized the playbook for such programs. But as consumer tools have launched seemingly endless feature and functionality innovations, business travelers and managers increasingly have clamored for similar enhancements and more in next generation managed travel toolsets.

They want business tools to adopt more of the intuitive consumer functionality; provide travelers with more choice before, during and after a trip; provide managers with more insights and communication options; and of course be fully-functional across desktop, agent-assisted, mobile or other channels, according to recent surveys, including "Vision: 2020, Projecting The Future Of Business Travel," published by Business Travel News.

Topping the travel manager wish list is "enhanced displays of flight/fare options," according to a survey of 133 travel buyers conducted this spring by The BTN Group and Travel and Transport. Respondents also cited a desire for "cost benchmarks to guide travelers" and to limit responses to "only those that meet business objectives."

This BTN Group white paper, sponsored by Travel and Transport, will explore the concerns that travel buyers have identified about the tools currently in the marketplace and detail the top enhancements for next generation tools as corporations further evolve their managed travel programs and how they rely on such technologies.

SATISFACTION WITH FUNCTIONALITY, EASE OF USE OF ONLINE BOOKING TOOLS	
TOPICS	RATINGS
Ease of use overall	3.75
Speed	3.72
Savings to program	3.67
Access to inventory	3.64
Functionality	3.61

Source: The BTN Group/Travel and Transport survey of 133 travel managers/buyers, February-March 2014

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> **SATISFACTION WITH CURRENT TOOLS**

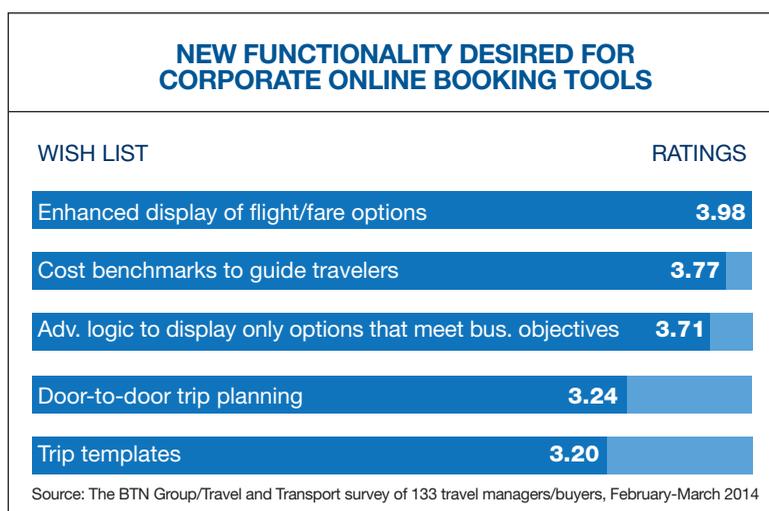
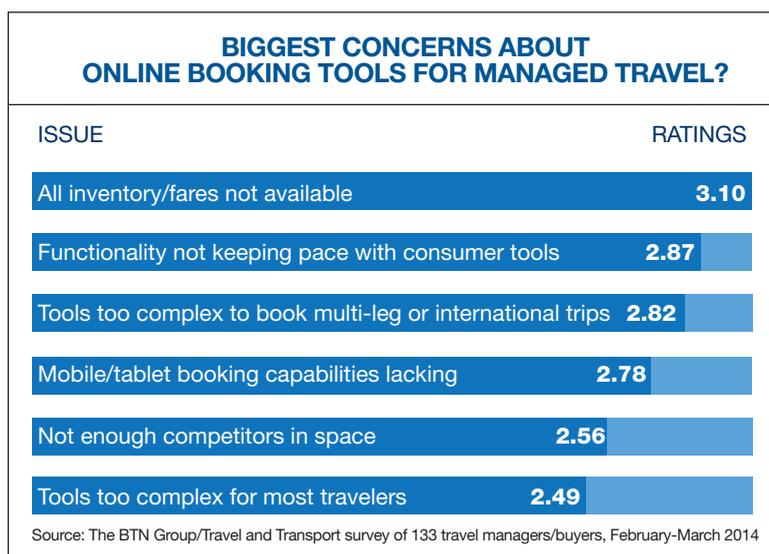
Fewer than 20 percent of buyers surveyed said they were “very satisfied” with access to inventory, speed and savings of their designated online booking tool with slightly more – 21 percent -- “very satisfied” with the overall ease of use and functionality. On the other end of the spectrum, nearly 13 percent of respondents said they were “mostly dissatisfied” with the functionality of their designated corporate online booking tool.

On a five-point satisfaction rating scale, buyers rated functionality the lowest at an average rating of 3.61, followed by access to inventory at 3.64 and savings to

program at 3.67. Buyers gave the highest satisfaction ratings to ease of use overall at 3.75 and speed at 3.72.

The majority (87 percent) of those surveyed had deployed at least one designated online booking tool and half said their deployments were global. Of the remaining 13 percent, about 10 percent said they expected to deploy an online booking tool this year. Just 3 percent of respondents said they didn’t have a tool or plans for one.

Given that the majority of companies and their travelers now use the tools to book managed travel, the demands on such tools have never been greater.



> **TOP CONCERNS: INVENTORY AND FUNCTIONALITY**

As to their top concern about online booking tools currently available for managed travel, nearly seven of 10 buyers surveyed cited “all inventory/ fares not available.” Six of 10 buyers said they were most concerned that the “functionality is not keeping pace with consumer tools.”

Travel and Transport chief operating officer Tim Fleming said he often hears customer concern “about the lack of choice in the marketplace today. Obviously we have several established tools in the market today in North America and Europe, but customers want more and more global choices. They’re not necessarily happy with the service they’re getting.”

One area of frustration expressed by several who registered for The BTN Group’s online booking webinar, sponsored by Travel and Transport, is the lack of global solutions. “Vendors have come a long way, but think global



and act local,” PhoCusWright managing director Tony D’Astolfo told webinar participants. “You want to create visual guilt, get savings, but you don’t want to deploy a tool that doesn’t work in a market.”

> CONSUMERISM, CONTENT, CONTEXT

“In the old days of online booking, travel managers worried about the three Cs – Cost, Control and Convenience,” D’Astolfo told webinar participants. “Today travel managers could be facing some daunting challenges based on three new C words: Consumerism, Content and Context.”

Content is no longer just about access to the inventory of all airlines, D’Astolfo continued, “but also

about ancillary content” and add-ons such as ground transportation or trip dining. Concerning context, D’Astolfo said, suppliers used to boast of their abilities to deliver “hundreds of options in seconds. Today, people don’t want hundreds of options; they want the exact right option, personalized to who they are and what they need.”

WellPoint Inc. director of travel and events Cindy Heston said she would like to see next generation online booking tools that empower travelers to customize their user experience. Heston she would like to see options that allow “travelers to set up navigation and where they land on a page, or bias in a way that makes sense for that individual.”

For managers, Heston said “a lot of what’s done now is painstakingly gathered from customers and sorted into different processes.” She would like to see more automated processes to identify travelers with status on specific carriers, of certain generations or who meet other criteria needed for market analysis.

Kiewit Corporation global director of travel and meetings Cindy Novak said she would love online booking tools to be able to “fulfill and process records with all carriers, all touchless,” to streamline operations and provide the most savings to her program. Also on her wish list are “integrated safety and security features, real-time-contract management” and communications.

Online booking tools must provide users with the ability to book more online, for example, not only all carriers but ancillary products, hotel blocks, multi-leg itineraries, non-GDS inventory and provide data on all such bookings, noted webinar participants. Their long list of enhancement suggestions can best be summarized as more, better, faster, simpler.

> NEW FUNCTIONALITY WISH LISTS

Next generation tools, Novak said, should include advancements that mirror the movement toward the “traveler-centric mode to allow them to share

CASE STUDY: KIEWIT CORPORATION

Construction and engineering firm Kiewit Corporation first embraced online booking in 2009 with Rearden Commerce’s Deem. Adoption grew to 37 percent in the United States and to 20 percent in Canada. In 2011, Kiewit deployed Concur Travel and Expense to about 8,000 travelers among its 30,000 employees, according to Cindy Novak, Kiewit director of global travel & meetings. Without a mandate, adoption dramatically increased to 89 percent in the United States and 65 percent in Canada.

“Our travel is very conducive to online booking tools,” Novak said recently on a BTN Group webinar sponsored by Travel and Transport. “Our travel patterns are primarily domestic so it was a perfect solution for us to move to online booking.” Company travelers are “satisfied and happy with the tool and love the self-serve efficiency.”

Novak appreciates having the “safety net of the agency partner to help” anytime employees need assistance and all appreciate the time and money savings the tool affords, she added. Travelers appreciate the TMC’s eTtek Dash mobile app that provides a summary of all information and quick push-to-call button to reach an agent.

Seeing all options on one screen and savings available with a slight schedule adjustment allows travelers to make the best decisions. “That visual guilt you hear about really does work,” Novak said.

Now, Novak wants to take the tool and program to the “next level with high safety and security” integrations. Novak also would like to deploy more traveler communications functionality, reviews, gamification and real-time contract management.”



comments, whether that is a restaurant review or great work-out location. We know we're requesting a lot of our travelers on the road and we want them to be able to share comments with colleagues."

At the top of her wish list, Heston said is "automated recognition of travelers as individuals, or groups based on corporate policies and integration with a more consumer-facing look to better appeal to travelers. Next generation tools also must include more about the "total trip" versus just the top three components of air, car and hotel today.

> MOBILE CHANGES EVERYTHING

Buyers, including Heston and Novak, noted the rapid movement to mobile bookings and said online booking systems in the managed travel market must give travelers the ability to change reservations from mobile apps, handle exchanges and synchronize the mobile changes on all reporting.

CASE STUDY: WELLPOINT INC.

Healthcare and insurance firm WellPoint Inc. first deployed an online booking tool in 2004 and overhauled its entire travel program five years ago when Cindy Heston, director of travel and events, joined the growing firm.

Adoption of its GetThere tool is at more than 90 percent for its 13,000 travelers, Heston told webinar participants. Key to the success, Heston said, has been the ability to bias preferred suppliers, message specific additional negotiated amenities such as airline status, hotel breakfast, parking, wireless or shuttles or car rental status, insurance or other extras.

The WellPoint travel team also has spent considerable time analyzing the traveler experience on the online tool for air, hotel and meeting bookings and introducing improvements.

Given the high percentage of online bookings, Heston said, travel agents continually search for saving opportunities to present to travelers to "emphasize the value of the agency" and managed travel program beyond the transaction.

> CHANNEL COMPLIANCE OR LEAKAGE

The most "talked about" functionality that next generation tools must include, Novak added is support for "channel compliance" also known as leakage. "It will be good to see a platform that we can customize for the whole open booking concept and the ability for our travel partners to support those bookings and how that will affect us in the future."

The overriding concern of buyers is providing travelers with the functionality, inventory, speed and convenience found on consumer tools. Managed tools must continue to deliver value to travelers and the corporations. Managed tools continue to serve two masters, D'Astolfo said. The traveler views the tools as just another work tool and they want "less complication, more efficiency and help managing the entire lifecycle of a trip." The other master is the chief procurement or financial officer who wants the tool to "manage a highly complex supplier network," wants data and is "challenged by fragmented content."

Finding that balance is the task of travel managers. For Travel and Transport, said Fleming, the "job is to build a sandbox filled with all the shiny tools that people want to play with. If we do that right and get all the tools in that sandbox that travelers want, why would they ever go outside the program?"



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